

The Advice Shop – You Said, We Did

Comments to action from customer surveys and staff suggestions in the 2017/18 period

The Advice Shop issues customer surveys to all customer groups and encourages staff suggestions and improvements on a monthly basis within team meetings.

The results have been analysed and are used to update the Advice Shop's Performance Indicators in Pentana.

All comments are recorded and those requiring action are listed below.

Customer/Staff Comment	Comment/Action	Action By
<p>Managing calls has become more difficult as the number of customers and partners requiring support has increased.</p>	<p>We adapted the case recording management system which has allowed us to better manage high volumes of calls and referrals. This has included separating calls and referrals from internal partners and separating duties for staff members.</p> <p>This allowed us to make queues more manageable with the resources available and has improved recording and reporting abilities.</p>	<p>Management Team</p>
<p>Continue to offer sessions in the local community for those who are unable to travel to Bathgate due to health or cost.</p>	<p>The service regularly reviews sessions across West Lothian to provide a full Advice Shop Service in the community. The service has developed new sessions in; Strathbrock (Broxburn) and Fauldhouse Partnership Centres and St John's Hospital. We are currently developing a new session within East Calder Partnership Centre.</p> <p>This has not only made our service more accessible for customers, it has improved</p>	<p>Management Team</p>

	<p>partnership working and helped in raising awareness of the support the Advice Shop can provide.</p>	
<p>Make the service more available to those who are unable to access during normal working hours.</p>	<p>We have successfully developed an online self-referral form for customers which is available 24/7 ensuring that there is alternative contact methods available for customers who are requiring support from the Advice Shop service.</p> <p>This has allowed us to gather required information to deal with large numbers of enquiries online or over the telephone, reducing the need for customer to attend an office.</p> <p>We are also working with our internal partners to develop online referral forms which will streamline processes improving referral quality, efficiency, and most importantly, the customer journey.</p>	<p>Management Team</p>
<p>The information around Personal Independence Payment can be very confusing for those who do not understand the benefit system.</p>	<p>The service has created a PIP (Personal Independence Payment) flyer which is provided to all customers who are enquiring about the benefit.</p> <p>The gives a better understanding around the benefit and the processes involved. The flyer also provides advice on the type of information which will be required to apply for the benefit.</p> <p>We have noticed a significant improvement in the information customers are now supplying when</p>	<p>Income Maximisation Team</p>

	<p>looking to apply for this benefit. This has meant that customers have a much better understanding and feel more comfortable quite a complex situation.</p>	
<p>Staff suggested changes to the Customer Record Management (CRM) System to reduce duplication of work and speed up processes.</p>	<p>The service has introduced multiple changes to the CRM system. These include;</p> <ul style="list-style-type: none"> • Quick view box to show we have a suitable mandate for customer. • Tick box to confirm that security questions have been asked and confirmed.(Previously recorded in a note) <p>The changes have reduced pressures on staff and improved recording and reporting from the CRM system.</p>	<p>Advice Shop Full Team</p>